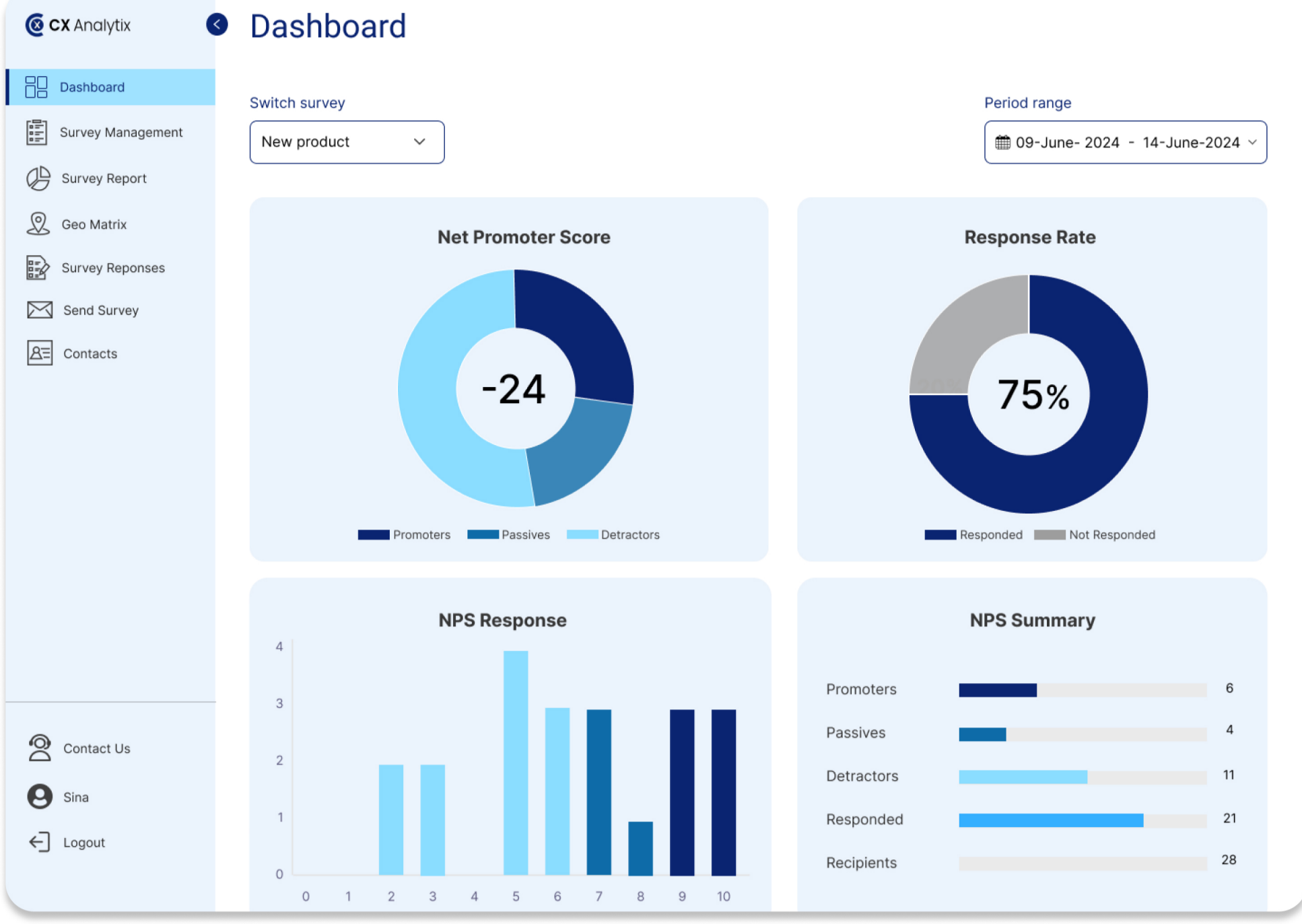


Navigate CX Analytix with Ease: A Complete Guide

Dashboard



1. Navigate to the Dashboard

Use the left navigation to access the NPS Dashboard.

2. Select the Survey

Choose from a list of surveys to analyze specific customer interactions. Choose the time period.

3. View Metrics

NPS Score: Shows overall customer satisfaction

Response Rate: The percentage of recipients who completed the survey.

NPS Response: Bar graph shows NPS response breakdown. Hover to see the number of respondents per score.

NPS Summary: Summary section shows total promoters, passives, detractors, responses, and recipients.

Survey Management

Survey Name	Actions
Hair & Compounds	[Edit] [Delete]
Different Hair	[Edit] [Delete]
Vitabae	[Edit] [Delete]

1. Navigate to Survey Management

Use the left navigation to access the NPS Survey Management.

2. Delete Survey

Click the delete button, but all related data will be permanently removed from the dashboard and reports.

3. Edit Survey

Click the edit button to modify details, but only if the survey hasn't been sent.

4. Create New Survey

To initiate a new survey, use the Create Survey button located in the top right corner of the page.

5. Name the Survey

Enter a name for your survey in the input field

6. Mandatory Main Question

How likely is it that you would recommend [Our Company/Product/Service] to a friend or colleague?

7. Edit Company/Product/Service Name

Use the input field to specify the product or service the survey is focused on in the Main Question.

8. Add Follow-Up Questions

Based on the NPS score, one of three follow-up questions appears. Choose 5-7 answers from the dropdown or add custom ones with "Add Your+."

Add custom answers by typing, clicking "Update," and selecting them from the dropdown. Reuse saved answers with "Add Previous Survey Answers."

9. Save Survey

Click "Save" to finalize your survey.

The 'Create Survey' form includes the following sections:

- Survey Name:** A text input field for the survey title.
- Main Question:** A text area for the primary question, with a note explaining the NPS scale (0-10).
- Follow-up Question:** A text area for a secondary question, with a note about its dependency on the NPS score.
- Promoters:** A section for defining follow-up questions for promoters, including a dropdown menu and an 'Add Yours' button.
- Add Custom Answer:** A text input field and an 'Update' button for adding custom follow-up questions.

Survey Response

Name	Email	Phone No.	NPS	Response
Govtham	xxxx@differenthair.com	9003761162	9	Accuracy, Return policy
Dhrip	xxxx@cxanalytix.com	9003761162	7	Accuracy, Quality
Prabhu	xxxx@cxanalytix.com	9003761162	3	Accuracy, Return policy
Karen	xxxx@differenthair.com	9003761162	1	Easy checkout, Inventory

1. Survey Results Overview

Key details for each respondent, including their Name, Email, Phone Number, NPS Score, and their answers to the follow-up questions.

2. Export Responses

Use the Export CTA to download all response data with full details, allowing for deeper analysis or reporting.

3. Recipients Details

Display a pop-up card showing the recipient's Name, Email, and the status of their response.

Send Survey

The 'Send Survey' form includes the following fields:

- To:** Recipient email address.
- From:** Email address (pre-filled with support@cxanalytix.com).
- Sender Name:** Name of the sender.
- Subject:** Survey subject line (pre-filled with 'WE VALUE YOUR FEEDBACK - Tell us what you think about your recent experience').
- Select your survey:** A dropdown menu to choose the survey to send.
- Message:** A text area for a custom message (pre-filled with 'Tell Us About Your Experience').

1. Select Recipients

Choose the email IDs of the recipients for the survey.

2. Common "From" Email

The From email address is pre-defined for consistency.

3. Specify Sender Name

Enter the sender's name that recipients will see in their inbox.

4. Set the Subject Line

Create a clear and engaging email subject.

5. Select the Survey Name

Pick the survey you want to send from the dropdown list.

6. Compose the Email Message

Write a brief message explaining the survey's purpose and encouraging participation & Click Send CTA

Contacts

Name	Email	Phone Number	Tags	Actions
Ethan Johnson	ethan.johnson@example.com	+1 (555) 123-4567	Sample	[Edit] [Delete] [Add Tag] [Send Email]
Priya Sharma	priya.sharma@example.com	+91 98765 43210	Orders	[Edit] [Delete] [Add Tag] [Send Email]
Carlos Rivera	carlos.rivera@example.com	+52 55 1234 5678	Sample	[Edit] [Delete] [Add Tag] [Send Email]
Hana Lee	hana.lee@example.com	+82 10-1234-5678	Sample	[Edit] [Delete] [Add Tag] [Send Email]
Aisha Khan	aisha.khan@example.com	+1 (555) 987-6543	Sample	[Edit] [Delete] [Add Tag] [Send Email]
Oliver Brooks	oliver.brooks@example.com	+92 300 1234567		[Edit] [Delete] [Add Tag] [Send Email]

1. Upload Bulk Customers

Use the option to upload a CSV file in the specified format to add multiple customers at once.

2. Add Individual Customers

For a few or individual customers, click the Add Customer CTA to enter their details manually.

3. Manage Customer Table

Add Tags: Enhance profiles with relevant tags.

Edit Customer: Update information as needed.

Delete Customer: Remove customers if no longer necessary.

Send Email: Directly send emails to customers from the contact details page.

4. Add Tags & Segments

Click on the Tags & Segments Tertiary CTA to access Segment and Tag Management.

Tag: To add a tag, click "Add Tag," enter the name, and click "Add." Modify or remove tags using the buttons next to each tag.

Segment: To create a segment, click "Add Segment," enter the name, and click "Add."

Locate your segment in the list, click the blue +, select tags, and confirm your selection.

The 'Segments Management' and 'Tags Management' sections provide tools for organizing customer data:

- Segments Management:** A table listing segments with columns for Name, Tag List, and Actions (Add, Edit, Delete).
- Tags Management:** A table listing individual tags with columns for Name and Actions (Edit, Delete).